Onboarding Manager: New System Features and Enhancements

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NEW SYSTEM FEATURES

Organization and Office Display

To improve system performance, the Selectee List page will only display selectee names assigned to the Organization and Office selected on the help menu bar. If you have access to multiple Organizations or Offices, you can use the drop-down list to select another Organization and/or Office. When submitting help desk tickets to Footprints (http://eshelp.opm.gov), include both the Organization and Office names as they are listed in Onboarding Manager so the help desk can assist with any issues or questions.

Task Assignments

Organization and Office Administrators can create and edit tasks in Administration. Tasks are activities that must be completed to onboard a selectee. Tasks can be designated as either *HR User Only* or *HR User and Selectee*. Tasks assigned to the *HR User Only* serve as internal reminders and checklists for the HR staff to ensure all onboarding requirements are completed. Tasks assigned to the *HR User and Selectee* serve as a way to communicate to the selectee that specific assignments are to be satisfied in order to complete the onboarding process (e.g. fulfilling various background investigation requirements, drug testing, physical fitness tests and other pre-employment obligations).

Standard HR users can assign tasks from the Assignments page, then select the **Tasks** tab, and click the **Assign/UnAssign Task** button. When a task is completed, an HR user can mark it as **Complete** and enter the date completed. There is also a section to enter notes about the task.

Selectees can view tasks assigned to them by navigating to the Current Assignments page and clicking the **Tasks** tab. Selectees can only view tasks and cannot mark them as complete. HR users will need to mark tasks as complete for the selectee.

Role Management and Administrative Access

Prior to this release, all HR users had the same level of access in Onboarding Manager which allowed any user with system access to perform all available functions. The updates in this release now allow organizations to better manage access and limit user activities to increase security.

Organization and Office Administrators

The OPM USA Staffing Program Office has worked with each organization to designate Organization and Office Administrators for Onboarding Manager. Administrators have access to several features under the new Administration module that include the following topic areas: Reports, User Maintenance, and Task Maintenance. Organization Administrators can perform any of these activities at either the Office or Organization level. Organization Administrators are assigned by the OPM USA Staffing Program Office. Office Administrators can perform Administration activities at the Office level only. Office Administrators are assigned by Organization Administrators.

Reports

Users assigned to Organization or Office Administrator roles can produce onboarding-specific reports in Administration. Reports are exported into Microsoft Excel and can be saved, sorted and modified in Microsoft Excel. Organization reports will generate data from the Organization selected from the drop-down list on the help menu bar. Office reports will generate data from the Office selected from the drop-down list on the help menu bar. Depending on your role the following reports are available:

- **Organization Cycle Time Metrics Report:** Displays key selectee onboarding milestone dates by organization.
- **Task Status Report:** Displays selectee task status dates by office.
- **Form Status Report:** Displays selectee form status dates by office.
- **Office Workload Report:** Displays the HR Owner and HR Contact by selectee.

- **Office eOPF Transmission Report:** Displays the Transmission Date and eOPF Confirmation Date by selectee.
- **Office Cycle Time Metrics Report:** Displays key selectee onboarding milestone dates by office.

User Maintenance

Organization and Office Administrators can manage user permissions through roles under the User Maintenance topic area of Administration. A role is a permission profile that restricts HR users assigned to it from accessing certain areas of the system. In User Maintenance, Administrators have the following sub-topic options:

- **View Roles.** On this page you can view, create, and delete roles. When creating and editing a role, you will check the forms, pages, and functions that the role will NOT have access to. Users will have access to any system area left unchecked on this page.

- **Assign Roles.** On this page you can assign and unassign users to roles. To assign a role, select the role from the drop-down list, check the box next to any user you want to assign the role to, and click **Assign**. To unassign a role, check the box next to any user you want to unassign a role from and click **Unassign**.

- **Customer Restriction.** On this page, you can restrict users from accessing selectees associated with specific customers. To do this, select a user. The screen will refresh, and you will see a list of available customers. Check the box next to any customer name that you do NOT want the user to access. If you will be restricting a large number of customers from a user, you can check the **All Customers** box and then uncheck any customers you would like the user to be able to access.

Task Maintenance

Users assigned to Organization or Office Administrator roles can view, create, edit, and delete tasks using the View Tasks page.

- **Create a Task.** To create a task, click **Create Organization Task** or **Create Office Task** at the top of the page. Add the task name, select the **Audience** and **State** from the drop-down lists and enter a description. The **Audience** drop-down list will allow you to make the task available for *HR Users Only* or *HR Users and Selectees*. The **State** drop-down list allows you to select either *Published* or *Unpublished*. Only *Published* tasks will be available for HR users to view and select. When entering a description, you should provide detailed information about this task. If the task will be viewable by selectees (i.e., designated as *HR Users and Selectees*), include instructions for the selectee on how to contact the HR user to notify him/her when the task is complete.

  Note: Selectees do not have the ability to mark a task as complete so these instructions are important to reduce selectee confusion.

- **Edit a Task.** To edit a task, click on the task name, make any required edits, and click **Save**.

- **Delete a Task.** To delete a task, check the box next to the task and click **Delete**.

eOPF Virtual Folders

Onboarding Manager now has the ability to transfer forms to your agency's virtual folders in eOPF. When a new form is added to your agency, the OPM USA Staffing Program Office can configure the form to be transmitted to a virtual folder specific to your agency. Standard users will not need to take any additional action to use this feature.

HR USER INTERFACE SYSTEM CORRECTIONS

Key Dates

Change Key Dates will no longer appear on the Key Dates page when a user is initially entering a record.

SELECTEE INTERFACE SYSTEM CORRECTIONS

Identity Verification

Selectees can no longer modify their first name on the identity verification screen when creating their account. They will need to contact their HR user to update this information if it is incorrect.

Welcome Screen

The pay plan displays accurately on the welcome screen.

Review Assignments

The Incomplete Questionnaire link on the Review Assignments page has been corrected to direct selectees to the correct sub-topic that needs to be completed.